



Strategic Investment Program (SIP)
ORS 285C.600-285C.635 & 307.123

Application for Project Determination
by Business Oregon Commission

DUE before the purchase or lease of property or any on-site work begins that will comprise investments in the project.

Applicant Business

Business Name, Mailing Address, Contact Person, Title, Phone Number, Email, Web page with company background, history and financials, Form of Organization (e.g., C-corporation), US State of Incorporation, Headquarter Location

Proposed Investment (the project)

Location, County(s), and, Inside a city's corporate limits?, urban growth boundary (UGB) containing a city of 40,000 or more in current population? (if yes, it is an urban project), Indian reservation (if yes, tribal government assumes county role)

Assessor map, tax lot number(s), etc. If located in a strategic investment zone (SIZ): Check here - whether using an SIZ or not - that all eligible project property subject to SIP will be newly located inside the SIZ boundary.

Name of SIZ, if applicable. Check below that all eligible project property subject to SIP: Will be newly acquired by the applicant business. Has not been part of any previously exempt SIP project. Has/will not receive Oregon enterprise zone exemption.

Estimated cost of each property type: Real estate (land and existing structures) to be acquired\*, New construction/improvements, Reconstruction, remodeling of existing buildings & structures, Real property (heavy/affixed) machinery & equipment, Personal property (readily movable equipment, etc.). Anticipated time line - dates for: Construction or other project work to commence, Project completion, Start of business operations with new facility/property

\* Not applicable if inside an SIZ.

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### Project description

In the space below/attachment, provide a brief narrative regarding building and investment plans consistent with the information above, including but not necessarily limited to facility square footage, construction phases, or potential impacts of construction on public services.

information attached

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### Local Approval Process (not applicable if using an SIZ)

Indicate that this application includes executed copies—or the status—of the following:

Any special report, document, etc., prepared for or provided to local governments regarding project	Yes	Unfinished	N/A
Evidence of county public hearing (agenda, sign-in sheet, etc.) prior to executing local SIP agreement	Yes	Pending	
Executed local SIP agreement with county and any applicable city	Yes	Pending	
Official action by county commission/court approving project for SIP after executing agreement	Yes	Pending	

If any of the above items are still pending/unfinished, check the following to confirm for this project:

Evidence and information is included demonstrating that the local–county SIP application process has been initiated.

It is hereby acknowledged that state approval for SIP must await full receipt by Business Oregon of the above items, and that even then, it cannot be guaranteed, so that if commencing construction or other project work in the meantime, the applicant hereby accepts the risk of not receiving local or state approval to receive SIP tax treatment on any such investment.

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### Existing Employment

**Annual average number of full-time equivalent (FTE) employees**—dividing total hours paid over the past 12 months by 2,080—who are subject to withholding taxes by your or any commonly controlled business, and that are located:

At the site, facility or operations, to

which the proposed investment will be made

Anywhere throughout Oregon (estimate)

(NOTE: Also include in the above figures for “retained jobs” the employees of any general contractor that entirely operates any such facility for your business, if applicable, but not those of any other type of contractor, subcontractor, vendor or supplier)

### Implications for existing operations or jobs with your or any commonly controlled business anywhere in Oregon:

Is there any probability that such jobs will be curtailed during the succeeding year? Yes No

Is there any expectation that such operations elsewhere in the state may be transferred to the above site or facility to work with property comprising the proposed SIP project? Yes No

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**Business Operations with New Facility or Property**

In the space below/attachment, describe these operations and goods or services to be produced, and the way in which they are engaged in markets for which national or international competition exists—that is, how do they relate to a traded-sector industry? information attached

**Estimated Future Employment Pursuant to Proposed Investments**

Total FTE jobs at the site, facility or operations (consistent with instructions/calculation above for retained jobs) Average annual taxable income to be paid, per job

In the space below/attachment, describe notable attributes of this workforce, such as major occupations, special training, use of local hires, or anticipated special demands on local public services (e.g., schools). information attached

**General Enclosures for All Projects**

Check below that this application includes all of the following as attachments or appendices, in addition to any applicable item above:

- Filing fee of \$5,000 or \$10,000 for an urban project (payable to "Oregon Business Development Department")
- Copy of first-source hiring agreement executed with local contact agency (nearest [Worksource Oregon](#) center)
- Map of proposed project, site plans and similar materials to supplement above project description
- Company background, history, financials and so forth, if not readily available from the Internet (if Web site entered above will suffice, leave unchecked)
- Any existing information or analysis about economic, local employment or public revenue impacts/benefits to be associated with the project or future business operations (if nothing relevant is available, leave unchecked)

**General Commitments for All Projects**

Check each one below to affirm that you, the applicant business, will do each of the following:

- Consider efforts to maximize the hiring or use of current residents, labor, etc., within the local community or region, to the extent practicable, in making investments and operating facilities associated with the project.
- Provide timely notification or evidence to the county assessor or the Oregon Department of Revenue (DOR), as requested, including but not limited to the date when property is certified for occupancy or used to effectively produce goods or services for sale.
- Ensure that the ultimate lessee of any leased project property is responsible for the taxes due on that property.
- Annually submit [report on employment and payroll](#) to Business Oregon under ORS 285C.615 by April 1, following the end of each property tax year of exemption.
- Pay additional fee of \$10,000, or \$50,000 for an urban project, after approval by the Business Oregon Commission, in order to be officially authorized to use the Strategic Investment Program (half of fee amount goes to DOR).

**Declaration by Applicant**

I hereby declare to have examined this application and all included documents. To the best of my knowledge, they are true, correct and complete in every material respect. If any such information changes significantly, I will notify the department and submit proper written amendments. It is understood that project property will receive the tax treatment under the Oregon Strategic Investment Program only if my business satisfies the requirements of ORS 285C.600 to 285C.635 and 307.123.

Signature (use blue or black ink)

Date

Printed name

Title of authorized company representative

Submit signed original, non-refundable application fee and all items and information requested here, unless otherwise indicated, to:

SIP Determination  
Business Oregon  
775 Summer Street NE, Suite 200  
Salem OR 97301